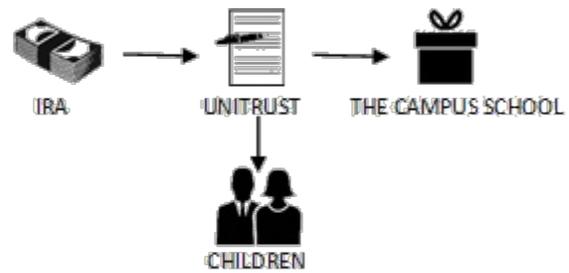




THE CAMPUS SCHOOL  
*of Carlow University*



## GIVE IT TWICE TRUST

You may be looking for a way to provide your children with income while making a gift to The Campus School. The "give it twice" trust is a popular option that allows you to transfer your IRA or other asset at death to fund a term of years charitable remainder unitrust. We call this kind of unitrust a give it twice trust because you can use the trust to pay income first to your family for a number of years and then distribute the balance of the trust to charity.

### Benefits of A Give It Twice Trust

- Use the full value of your unused retirement account to provide income to your surviving spouse and to provide income to children or other loved ones for a specified period of time
- Create an estate tax deduction and savings from the charitable gift
- Support the important charitable work of The Campus School

### How A Give It Twice Trust Works

1. We can help you and your attorney with the process of creating a charitable remainder unitrust.
2. You complete an IRA or other retirement account beneficiary designation form, naming the charitable trust as the beneficiary, and return the form to the account custodian.
3. When you pass away, the custodian will transfer your retirement account to the charitable trust.
4. The trust will pay income to your spouse, children or other individual beneficiaries for their life, term of years or life plus term of years.
5. At the conclusion of the payments, the balance of the trust will be transferred to The Campus School.

### Contact us

If you have any questions about a give it twice trust, please contact Tiffany Jimenez, Campus School Director of Development, at 412-578-6260 or via email at [tmjimenez@carlow.edu](mailto:tmjimenez@carlow.edu).

### ADDITIONAL INFORMATION

**Provides Tax Savings.** The give it twice trust produces income and estate tax savings.

**Promotes Fairness.** The give it twice trust establishes a mechanism that will help you treat each of your children equally. This can help promote peace in your family.

**Teaches Your Children.** Give children income rather than a lump sum. Studies of inherited wealth have concluded that many children spend lump sum inheritances, whereas they learn to be more responsible with inheritances paid out over time.



THE CAMPUS SCHOOL  
*of Carlow University*